



DIGITAL &
TRANSFORMATION

Practice Toolkit for Care Navigation

Introduction

NHS England estimates **15% or more** of incoming patient contacts could be directed to non-GP services or other professionals through effective navigation ([NHS England How To Improve Care Navigation In General Practice](#)). Care navigation ensures patients reach the right service at the right time, reducing strain on GP appointments. A well-structured system enhances patient outcomes, workflow efficiency, and staff effectiveness.

How This Toolkit Helps:

- ✓ **Develop a structured Care Navigation Policy** with templates and processes.
- ✓ **Train and upskill staff** using the Standard Operating Protocol and Call Script/Guide.
- ✓ **Customise workflows** with process mapping and best practice.
- ✓ **Enhance patient communication** through directories and quick-reference guides.

Understanding Care Navigation

What is Care Navigation?

Care navigation guides patients to the most appropriate service based on their needs, reducing reliance on GP appointments.

Some examples include:

- **General Practice** – Understanding the different roles and capabilities within the practice and PCN teams, including ARRS roles (e.g., Clinical Pharmacists, Social Prescribers, First Contact Physiotherapists), helps ensure patients are routed effectively.
- **Pharmacy Services** – Supporting minor ailments, medication advice, and repeat prescriptions.
- **Social Prescribing** – Connecting patients to mental health, wellbeing, and community support services.
- **Physiotherapy** – Directing musculoskeletal issues to the right specialist care.
- **Digital Healthcare Options** – Encouraging self-management via the NHS App, online consultations, and self-referrals.

Why is Care Navigation Important?

1.  **Better Patient Access** – Reduces waiting times and directs patients efficiently.
2.  **Optimised Workflow** – Minimises unnecessary GP visits and diverts demand.
3.  **Reduced Administrative Burden** – Lowers call volumes and streamlines bookings.
4.  **Enhanced Patient Experience** – Provides clearer, faster, and more effective care journeys.

Benefits of Care Navigation

INTEGRATION

Encourages communication and sharing across health sectors, social care and voluntary organisations.

FREE UP RESOURCES

Reduces avoidable appointments within the practice.

CONTINUITY

Improves continuity of care for those who need it.

IMPROVED EFFICIENCY

Streamlined processes create efficiencies and reduce failure demand (avoiding duplication and decreasing workload).

FAIR ALLOCATION

Workload is allocated fairly and appropriately across staff teams.

WELLBEING

Improves staff experience and wellbeing, as resistance from patients decreases and satisfaction increases.

UNPLANNED ATTENDANCE

Reduces avoidable A&E attendances by supporting patients at the right time with the care they require.



Implementing Care Navigation Effectively

These steps help to standardise Care Navigation, ensuring clear processes, effective communication, and the right use of digital tools to direct patients efficiently.

1. Understand

- Assess current demand and capacity.
- Audit recent consultations to identify where navigation can help.
- Define key metrics to track success.

2. Design a Care Navigation Standard Operating Model (SOP)

- Develop workflows with structured flowcharts and protocols.
- Build a service directory with referral routes to key providers.
- Train staff on question scripts and navigation processes.

3. Go Live

- Confirm the go live date and work towards it.
- Gather structured patient information at first point of contact.
- Communicate changes to patients via all communication channels.
- Hold frequent check-ins with staff and patients to troubleshoot issues.

4. Measure & Improve

- Track key data sets.
- Collect feedback from patients and staff to refine workflows.
- Update directories, training, and protocols as needed.

1. Understand Your Data

Effective care navigation starts with understanding patient demand and service capacity. Without clear insights, practices risk inefficiencies, unnecessary GP appointments, and patient dissatisfaction. By auditing avoidable appointments and tracking key metrics, practices can optimise workflows, direct patients to the right services, and improve access to care.

Assess Demand & Capacity

- Measure daily call/request volumes.
- Identify peak demand periods.
- Review appointment types & availability.
- Complaints about access and ability to see a GP.
- Patients not receiving continuity of care when needed.

Audit Avoidable Appointments

- Referrals to pharmacy first (accepted/declined).
- Referrals to social prescribing link worker.
- Signposting to wider team (non-GP).
- Reattendances within 2 weeks for the same issue.

Define Key Success Metrics

- % of patients successfully redirected.
- Wait time reduction (before vs. after).
- Patient satisfaction with navigation.
- Staff satisfaction and wellbeing.

2. Care Navigation SOP Checklist & Templates

Below are the key components and supporting resources to help you structure an effective process.

Component	Description	Supporting Information
Clear Care Navigation Objectives	Define purpose, expected outcomes, and impact on patient access.	Care Navigation SOP Template
Defined Workflows & Protocols	Step-by-step process for triaging patient requests and routing services.	Care Navigation Process Flow – A flow diagram mapping care navigation. Call Scripts/ Guidance – Predefined scripts for consistent patient interactions. Care Navigator A-Z Navigator Guide – A structured tool for assessing needs and referral pathways.
Define Available Skills	Clearly outline the skills and expertise available within the practice and PCN, so care navigators can direct patients to the most appropriate professional based on their presenting issue.	Skills-matrix-template-tool.xlsm Appointment 3T's (Type/Time/Team) – Defines roles within the practice and PCN, including ARRS roles.
Comprehensive Directory of Services	Up-to-date contacts and referral pathways for local healthcare providers.	NHS Service Finder
Training & Competency Framework	Ongoing staff training, ideally for Receptionists and Care Navigators in triaging.	Care Navigation Training Programme
Digital & Telephony Integration	Align care navigation with online consultation platforms and telephony system. routine/urgent	
Patient Comms Approach	Transparent messaging across all communication channels to educate patients, including consistent messaging from care navigators.	Messaging Quick Wins
Data Monitoring & Performance Metrics	Regular review process for appointment diversions, call handling efficiency, etc.	
Feedback & Continuous Improvement Plan	Collect input from staff and patients to refine workflows.	Post-Appointment Reminders
Clinical System Template	EMIS template for staff to record and report on care navigation. Please note – Each practice is responsible for maintaining and verifying that the codes in this template are accurate and up to date.	EMIS Care Navigation Template , if using SystmOne, please speak to the team for guidance on building a Care Navigation template.

Integrating Digital Tools into Care Navigation Process

Digital tools enhance care navigation by improving efficiency and access.

Telephone Systems	Online Consultation Platforms	Digital Triage & Self-Help	Appointment Booking Tools
• Upgrade to cloud-based telephony for better call flow and improved patient journey. • Use advanced features such as automated menus, queue call-back, and call routing. • Monitor call data to adjust staffing and improve service.	• Train staff to triage structured patient submissions. • Promote online and NHS App appointment booking.	• Provide self-help resources for minor conditions through the website and NHS App. • Encourage patients to self-care when appropriate, and link to local Directory of Service (DOS).	• Use one-time booking links for specific services. • Train staff to ensure triage and booking processes are aligned. • Use embargoes to spread the appointment demand reducing the 8am rush.

3. Go-Live

A smooth go-live ensures staff are prepared, patients understand the changes, and workflows run efficiently. Use this checklist to finalise processes, update systems, and monitor performance for a successful launch.

Go Live Phase: Key Actions

- **✔ Use Structured Questioning** – Ensure receptionists follow scripts to direct patients appropriately.
- **✔ Update Appointment Booking System** – Adjust slots to align with care navigation pathways.
- **✔ Utilise Digital Tools** – Online forms, call routing, and NHS App integration enhance efficiency.
- **✔ Communicate with Patients** – Announce changes via all communication channels.
- **✔ Monitor & Adjust** – Conduct check-ins with staff to refine workflows accordingly.

Go-Live Checklist:

- **✔ Care Navigation SOP Finalised** – All staff trained on processes and scripts.
- **✔ Directory of Services Updated** – Up-to-date contacts and referral pathways in place.
- **✔ Digital & Telephony Integrated** – Online and phone triage systems aligned.
- **✔ Appointment Book Configured** – New slots for alternative services (e.g. pharmacy, social prescribing).
- **✔ Communication Plan Implemented** – Patients informed through multiple channels.
- **✔ Data Monitoring Set Up** – Metrics tracked (e.g. patient redirection rates, GP availability).
- **✔ Feedback Mechanism Live** – Staff and patient feedback collected for continuous improvement.

4. Measuring Success & Continual Improvement

After implementing your **Care Navigation SOP**, ongoing monitoring and reviews ensures it's working effectively. Regularly reviewing key metrics helps **identify gaps, inefficiencies, and areas for improvement**. Data-driven insights can guide **service adjustments, staff training, and process refinements** to enhance patient experience and operational efficiency.



Avoidable Appointments – Audit the number of GP appointments that could have been handled elsewhere.



Pharmacy Referrals – Track referrals to pharmacies and the rate of declined referrals.



Wider Team Signposting – Assess how many patients are directed to non-GP staff (e.g. ARRS roles).



Reattendance Rates – Monitor repeat visits within two weeks for the same issue.



Patient Complaints – Identify concerns around access, appointment availability, and referral appropriateness.



Continuity of Care – Track instances where patients fail to receive follow-up or ongoing support.

✚ Use this data to refine your care navigation approach—adjust services, enhance staff training, and improve patient signposting.

Common Challenges & Solutions

Category	Challenge	Solution
Patient Resistance	Patients may feel uncomfortable sharing health details with reception staff.	Clearly communicate care navigation's purpose. Use reassuring phrases like <i>"We follow GP-approved procedures to get you the right help quicker."</i> Trust builds as patients experience better service.
Staff Confidence & Role Clarity	Receptionists may feel anxious about their role and responsibilities.	Provide thorough training, clear protocols, and clinical support. Share success stories these help to boost morale and confidence.
Keeping Service Directories Updated	Outdated directories lead to incorrect referrals.	Assign a team member to update directories regularly if possible, ensuring local services align, maintain a shared PCN directory for accuracy.
Integrating New Roles	Overlapping roles (e.g. Social Prescribers, Health Coaches) can cause confusion.	Define clear job roles and descriptions, update care navigation pathways and communicate with receptionists. Regular coordination meetings improve communication.
Ensuring Consistency	Navigation quality may differ under pressure.	Use guidance documents provided. Supervision, feedback, and a care navigation champion help maintain standards. Recognising success keeps staff engaged.